

2007

CiviCRM Member User Manual



Produced by BIS 412

The Collaboratory

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General Civi Background and Information

“CiviCRM is the first open source and freely downloadable constituent relationship management solution. CiviCRM is web-based, open source, internationalized, and designed specifically to meet the needs of advocacy, non-profit and non-governmental groups.

CiviCRM is a powerful contact, fundraising and eCRM system that allows you to record and manage information about your various constituents including volunteers, activists, donors, employees, clients, vendors, etc. Track and execute donations, transactions, conversations, events or any type of correspondence with each constituent and store it all in one, easily accessible and manageable source.

CiviCRM is created by an open source community coordinated by CiviCRM LLC, and the 501c3 non-profit Social Source Foundation. “

<http://civicrm.org/aboutcivicrm>

CiviCRM Wiki and Forum

While we will document CiviCRM as customized for The Collaboratory extensively in this and other appropriate user guides, it is possible that the answer you seek will not be found in our documentation. Should this happen, there is a CiviCRM wiki where you can search for your answer. On the wiki, CiviCRM and its components are described in great detail and is quite organized. If the answer cannot be found on the wiki, there is also a CiviCRM forum available to you on the website. There is a large community of CiviCRM users and this is a great place to ask any questions that might arise and to which you are not able to find an answer in our user’s guides or the wiki. On top of these features, the CiviCRM website contains a FAQ as well as a blog which might be useful for things such as knowing when to update and what new functionality might be available.

Wiki - <http://wiki.civicrm.org/confluence/display/CRM/Home>

Forum - <http://forum.civicrm.org/>

FAQ - <http://wiki.civicrm.org/confluence/display/CRMDOC/FAQ>

Blog - <http://civicrm.org/blog/>

Member Specific Notes

The member role as defined in the CiviCRM system will be any Collaboratory student member or faculty advisor. The people serving in this role will need to be able to perform all of the tasks outlined in this user manual.

Use Cases and Step by Step Instructions

The following sections of this manual will contain step by step instructions for performing the functions required of a member. They will be broken down by the three modules contained within CiviCRM – CiviMember, CiviContribute, and CiviMail – for organizational purposes.

Login Instructions

1. Go to <http://bis412.selfip.com/dru5/> and login as a member.
2. Click 'CiviCRM' link on the left.

CiviMember Instructions

About CiviMember - <http://civicrm.org/civicrm>

CiviMember Guide - <http://wiki.civicrm.org/confluence/display/CRM/CiviMember+Guide>

1. Application Groups

1.1 Associate Partners with Application Groups or Site Teams

1. Login
2. Search for the contact you wish to add to an application group or site team using the process described in “3.3 Search for a Partner.”
3. Once the list is populated from your search, click on the name of the partner you wish to associate with an Application Group or Site Team.

Found 6 contacts

Print - more actions - Go

☐ selected records only ☐ all 6 records

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

<input type="checkbox"/>	Name	Address	City	State	Postal	Country	Email	Phone
<input type="checkbox"/>	Beiler, Anna							View Edit
<input type="checkbox"/>	Bennett, Jay							View Edit
<input type="checkbox"/>	Curd, Valerian							View Edit
<input type="checkbox"/>	Derr, Andy							View Edit
<input type="checkbox"/>	dv@gmail.com						dv@gmail.com	View Edit
<input type="checkbox"/>	Earl, Brendan							View Edit

4. You will see the following profile screen for the partner you selected.

Anna Beiler

Recently Viewed: Anna Beiler dv@gmail.com

Summary Events Activities Relationships Groups Notes Tags Change Log

Anna Beiler [Edit](#) [vCard](#) [Delete](#) [» View Contact Dashboard](#)

Send an Email Schedule a Meeting Schedule a Call Log a Meeting Log a Call Other Activities

☐ (primary location)

☐ Communications Preferences

Privacy: Method: Mail Format Preference: Both

☐ Demographics

Gender: Date of Birth: July 13th, 1984

5. Click the 'Tags' tab.

Anna Beiler

Recently Viewed: Anna Beiler dv@gmail.com

Summary Events Activities Relationships Groups Notes **Tags** Change Log

6. Click the 'Edit Tags' link at the bottom.

- Put a check mark in the box next to the appropriate rows.

Tags

Mark or unmark the checkboxes, and click 'Update Tags' to modify tags.

<input type="checkbox"/>	Site Team: Burkina Faso
<input checked="" type="checkbox"/>	Site Team: Guatemala
<input type="checkbox"/>	Site Team: Honduras
<input checked="" type="checkbox"/>	Site Team: Kenya
<input type="checkbox"/>	Site Team: Liberia
<input type="checkbox"/>	Site Team: Malawi
<input type="checkbox"/>	Site Team: Mali
<input type="checkbox"/>	Site Team: Mozambique
<input type="checkbox"/>	Site Team: Zambia

- Click the 'Update Tags' button.

2. Edit Member Information

2.1 CRUD Member Contact

- Login
- Search for yourself in the same way you would search for a partner as described in “3.3 Search for a Partner.”
- Click your name.
- You will be presented with the following screen where you can edit various information for yourself.

dv@gmail.com

Recently Viewed: dv@gmail.com Anna Beiler

Summary Events Activities Relationships Groups Notes Tags Change Log

dv@gmail.com Edit vCard Delete » View Contact Dashboard » View User Record

Send an Email Schedule a Meeting Schedule a Call Log a Meeting Log a Call Other Activities

Home (primary location)
Email: dv@gmail.com

Communications Preferences
Privacy: Method: Mail Format Preference: Both

Demographics

3. Partners

3.1 Create a New Partner

1. Login
2. Click the 'New Individual' link on the menu on the left.



3. Fill in the appropriate partner information in the corresponding fields.
4. Scroll to the bottom of the page.
5. Click the '+' next to 'Tags and Groups'

+ Additional Location

+ Demographics

+ Notes

+ Tags and Groups

Save Save and New Cancel

- Make sure to check the box next to 'Contacts: *Your Name.*' This is essential because without this step you will not be able to edit the partner that you have just entered.

Tags and Groups

Group(s)	Tag(s)
<input checked="" type="checkbox"/> Contacts: DVader	<input type="checkbox"/> Site Team: Burkina Faso
	<input type="checkbox"/> Site Team: Guatemala
	<input type="checkbox"/> Site Team: Honduras

Save Save and New Cancel

- Click the 'Save' button.

3.2 Update a Partner

- Login
- Search for a partner as described in "3.3 Search for a Partner."
- Once the list is populated from your search, click on the name of the partner you wish to delete.

Found 6 contacts


Print - more actions - Go



☐ selected records only ☐ all 6 records

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

	Name	Address	City	State	Postal	Country	Email	Phone
<input type="checkbox"/>	Beiler, Anna							View Edit
<input type="checkbox"/>	Bennett, Jay							View Edit
<input type="checkbox"/>	Curd, Valerian							View Edit
<input type="checkbox"/>	Derr, Andy							View Edit
<input type="checkbox"/>	dv@gmail.com						dv@gmail.com	View Edit
<input type="checkbox"/>	Earl, Brendan							View Edit







- You will see the following profile screen for the partner you selected.


 Anna Beiler


Recently Viewed:  Anna Beiler  dv@gmail.com

Summary Events Activities Relationships Groups Notes Tags Change Log


Anna Beiler [Edit](#) [vCard](#) [Delete](#) » [View Contact Dashboard](#)

 [Send an Email](#)  [Schedule a Meeting](#)  [Schedule a Call](#)  [Log a Meeting](#)  [Log a Call](#)  [Other Activities](#)

 (primary location)

 Communications Preferences

Privacy: **Method:**
Mail Format Preference: Both

 Demographics

Gender: **Date of Birth:** July 13th, 1984

- Click the 'Edit' button.

Summary Events Activities Relationships Groups Notes Tags Change Log

Anna Beiler [Edit](#) [vCard](#) [Delete](#) » [View Contact Dashboard](#)

- Edit what you need to edit and then click the 'Save' button.

3.3 Search for a Partner

- Login
- Click on the 'Find Contacts' link on the left menu.

CiviCRM

- [CiviCRM Home](#)
- [Find Contacts](#)
- [Manage Groups](#)
- [CiviEvent](#)

- At this point you can either do a blank search to populate a list of all contacts, do a simple search by name, or click on 'Advanced Search' and search on any information stored in the system.

Find Contacts

Recently Viewed: Jay Bennett David Enders robdwilk@gmail.com

[Find Contacts](#) [Advanced Search](#) [Search Builder](#)

Use the Search Criteria form to find contacts by name, type of contact, group membership, tags, etc. You can then view or edit contact details, print a contact list, assign tags, export contact data to a spreadsheet, etc.

Search Criteria

Find... in Tagged

Name

To search by first AND last name, enter 'lastname, firstname'. Example: 'Doe, Jane'. For partial name search, use '%partialname' ('%' equals 'begins with any combination of letters'). To search by email address, use [Advanced Search](#).

[Search](#)

[» Advanced Search](#)

3.4 Delete a Partner

- Login
- Search for a partner as described in "3.3 Search for a Partner."
- Once the list is populated from your search, click on the name of the partner you wish to delete.

Found 6 contacts

[Print](#) [Go](#)

☐ selected records only ☐ all 6 records

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

<input type="checkbox"/>		Name	Address	City	State	Postal	Country	Email	Phone
<input type="checkbox"/>		Beiler, Anna							View Edit
<input type="checkbox"/>		Bennett, Jay							View Edit
<input type="checkbox"/>		Curd, Valerian							View Edit
<input type="checkbox"/>		Derr, Andy							View Edit
<input type="checkbox"/>		dv@gmail.com						dv@gmail.com	View Edit
<input type="checkbox"/>		Earl, Brendan							View Edit

- You will see the following profile screen for the partner you selected.

👤 Anna Beiler

Recently Viewed: 👤 Anna Beiler 📧 dv@gmail.com

Summary Events Activities Relationships Groups Notes Tags Change Log

Anna Beiler [Edit](#) [vCard](#) [Delete](#) » [View Contact Dashboard](#)

✉ Send an Email 🗓 Schedule a Meeting ☎ Schedule a Call 🗣 Log a Meeting 📞 Log a Call ⚙ Other Activities

📁 (primary location)

📁 Communications Preferences

Privacy: **Method:**
Mail Format Preference: Both

📁 Demographics

Gender: **Date of Birth:** July 13th, 1984

5. Click the 'Delete' button.

Summary Events Activities Relationships Groups Notes Tags Change Log

Anna Beiler [Edit](#) [vCard](#) [Delete](#) » [View Contact Dashboard](#)

6. Confirm.

4. Prayer List Registration

4.1 Sign up for a Prayer List

1. Login
2. Click on *Subscribe to a Prayer List* on the top right of the page.

3. Select the prayer lists to which you wish to subscribe and click continue.

Email Address *

Select a Prayer List

Tag(s) *

- ☒ Site Team: Burkina Faso
- ☒ Site Team: Guatemala
- ☐ Site Team: Honduras
- ☐ Site Team: Kenya
- ☐ Site Team: Liberia
- ☐ Site Team: Malawi
- ☐ Site Team: Mali
- ☒ Site Team: Mozambique
- ☐ Site Team: Zambia

4. Verify that the recorded information is correct and then press *Continue*. If there is an error, click *Go Back* and then correct the prayer list subscription information.

Subscribe to a Prayer List

Please verify the information below carefully. Click **Go Back** if you need to make changes. To complete this transaction, click the **Continue** button below.

Select a Membership Renewal Level

Prayer Partner
All contacts subscribed to one or many prayer lists are considered prayer partners

Select a Prayer List

Select a Prayer List

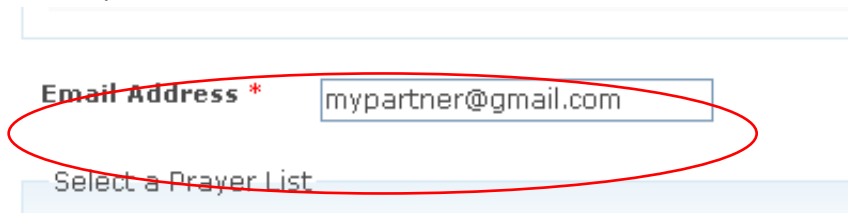
Tag(s)

- [x] Site Team: Burkina Faso
- [x] Site Team: Guatemala
- [] Site Team: Honduras
- [] Site Team: Kenya
- [] Site Team: Liberia
- [] Site Team: Malawi
- [] Site Team: Mali
- [x] Site Team: Mozambique
- [] Site Team: Zambia

4.2 Sign up a Partner for a Prayer List

1. Login

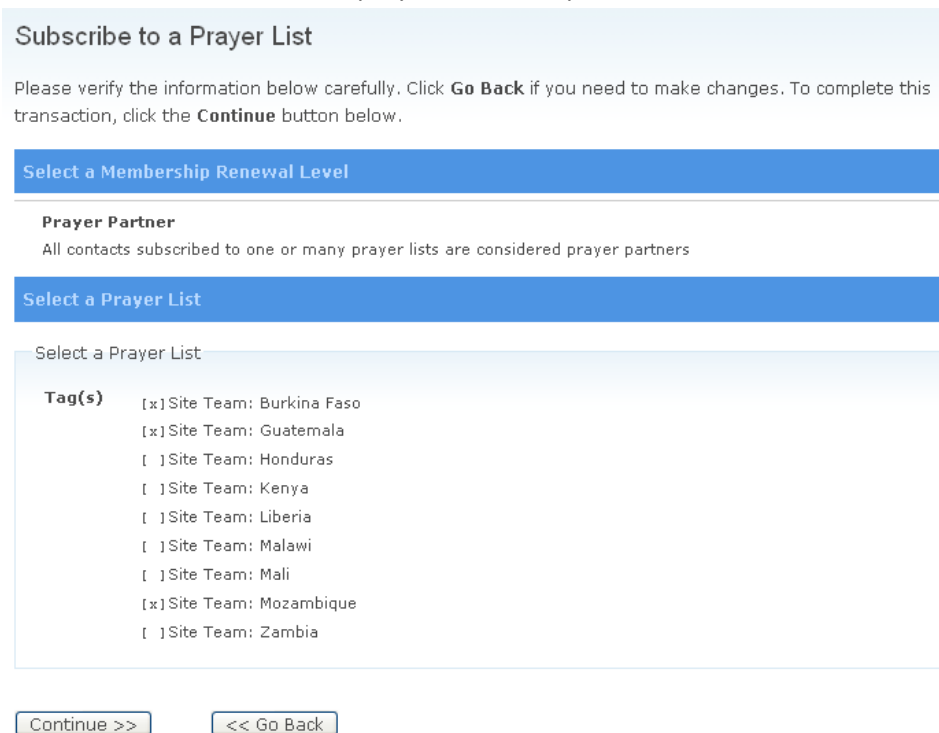
2. Click on *Subscribe to a Prayer List* on the top right of the page.
3. Enter the email address of the partner who you wish to subscribe to prayer lists. The email address you enter here must match the email address recorded for them in the database.



Email Address * mypartner@gmail.com

Select a Prayer List

4. Select the prayer lists to which your partner wishes to subscribe and click continue.
5. Verify that the recorded information is correct and then press *Continue*. If there is an error, click *Go Back* and then correct the prayer list subscription information.



Subscribe to a Prayer List

Please verify the information below carefully. Click **Go Back** if you need to make changes. To complete this transaction, click the **Continue** button below.

Select a Membership Renewal Level

Prayer Partner
All contacts subscribed to one or many prayer lists are considered prayer partners

Select a Prayer List

Select a Prayer List

Tag(s)

- ☒ Site Team: Burkina Faso
- ☒ Site Team: Guatemala
- ☐ Site Team: Honduras
- ☐ Site Team: Kenya
- ☐ Site Team: Liberia
- ☐ Site Team: Malawi
- ☐ Site Team: Mali
- ☒ Site Team: Mozambique
- ☐ Site Team: Zambia

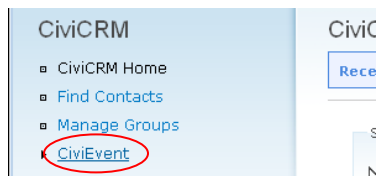
Continue >> << Go Back

CiviEvent Instructions

5. Event Registration

5.1 Register for an Event

5. Login
6. Click CiviEvent.



7. Click on the event in which you wish to register.

A screenshot of the CiviEvent page. The page has a sidebar on the left with links: Home, Contacts, Groups, Event, and Find Participants. The main content area is titled 'CiviEvent' and shows 'Recently Viewed: David Vader'. Below this, there is a paragraph explaining CiviEvent and a section titled 'Event Summary' which contains a table of events. The table has columns: Event, Type, Public, Participants, and Date(s). The first row is 'CiviCRM Training', which is circled in red. The table also shows 'Meeting' as the type, 'No' as public, '1' participant, and 'May 10th 2007 to May 10th 2007' as the date. At the bottom, there is a footer mentioning 'Powered by CiviCRM 1.7.9379' and 'CiviCRM is openly available under the Affero General Public License (AGPL)'.

Event	Type	Public	Participants	Date(s)
CiviCRM Training	Meeting	No	1	May 10th 2007 to May 10th 2007

8. Click on *Register Online!*
9. Type your email address and click continue.
10. Verify the information to ensure it is correct and click *Continue*.

5.2 Register a Partner for an Event

1. Follow the same instructions as above (5.1), except enter your partner's email address instead of your own.